

Oil and Gas Security and Service Market by Component (Solution and Services), Services, Security Type (Physical Security and Network Security), Operation (Upstream, Midstream, and Downstream), and Region - Global Forecast to 2025

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Abstracts

“Increased expenditure by oil and gas companies on network and physical security expected to drive the growth of the oil and gas security and service market”

The global oil and gas security and service market size is expected to grow from an estimated value offrom USD 25.3 billion in 2020 to USD 32.5 billion by 2025, at a Compound Annual Growth Rate (CAGR) of 5.2% during the forecast period. The oil and gas security and service industry is driven by various factors, such as growing political instability in Middle East and need to ensure compliance with industry regulations in oil and gas security and service market.However, high reliance on existing security solutions can hinder the growth of the market.

The recent COVID-19 pandemic is expected to impact the oil and gas security and service industry. The pandemic and subsequent response is already exerting pressure on governments, economies, households, and different industries across world. The oil and gas industry, both on shore and offshore, are mostly affected by Stuxnet and Exxon’s Torrance. Fluctuation in oil prices and political instability in the MEA and APAC region have set the stage for cyber disasters in the oil and gas industry.

Service segment to grow at a higher CAGR during the forecast period

According to the deputy director of GCHQ, Brian Lord, the oil and gas industry is the second most susceptible sector to cyber-attacks. The upstream, midstream, and

downstream sectors are highly digitalized, which makes them more prone to cyber-attacks. Companies are focusing more on security services to prevent such attacks. Viruses and malware are evolving daily due to which it becomes very difficult for old systems and security patches to identify threats. Consequently, organizations are updating security patches and software to secure themselves from cyber-attacks. Due to the outbreak of COVID-19, companies such as NTT Security is started offering managed services to help oil and gas companies to manage their all aspects of cybersecurity. Increase in the number of connected devices, which raises the number of endpoints, has increased cyber issues recently. Moreover, lack of awareness about oil and gas security solutions and services, difficulty in the implementation of the IT technologies, and vulnerabilities associated with the cloud have also affected the oil and gas industry, which provides growth opportunities to service providers.

Solution segment to account for a higher market share during the forecast period

Oil and gas companies, which form the backbone of many regions, are facing unprecedented challenges due to various reasons, ranging from geopolitical issues to the obstacles created by the current pandemic. Onshore wells, offshore platforms, and oil and gas pipelines constitute the key assets of energy companies, and ensuring the cybersecurity of these assets is critical for companies. To comply with regulations, upkeep asset performance, and utilize business resources optimally, oil and gas companies are switching to cloud technologies. Migration to the cloud makes organizations more vulnerable to cyber-attacks, which call for proper security measures. The increasing number of mobile devices, including personal and those used by field personnel, in utility companies' corporate networks has raised the chances of cyber-attacks. Consequently, the demand for security solutions has catapulted remarkably.

Middle East and Africa to grow at the highest rate during the forecast period

The oil and gas security and service market in Middle East and Africa is expected to grow at the highest CAGR during the forecast period. The rise of various terrorist groups and militias and vacuum created due to the ineffective governments in the Middle Eastern and northern African countries is propelling the need for oil and gas security solutions. In the North America, there is a tremendous demand for oil and gas security and service.

In-depth interviews were conducted with Chief Executive Officers (CEOs), marketing directors, other innovation and technology directors, and executives from various key organizations operating in the oil and gas security and service market.

By company type: Tier 1:38%, Tier 2:42%, and Tier 3: 20%

By designation: C-level:32%, Directors:36%, and Others: 32%

By region: North America: 35%, Europe: 27%, APAC:23%, MEA: 10%, Latin America: 5%

Major vendors offering oil and gas security and service solution across the globe are Cisco (US), NortonLifeLock (US), Honeywell (US), Siemens (Germany), Microsoft (US), Lockheed Martin (US), ABB (Switzerland), Parsons (US), Fortinet (US), Trend Micro (Japan), Forescout (US), GE (US), Synectics (UK), Intel (US), Speedcast (Australia), Booz Allen (US), Thales (France), HCL (India), IBM (US), BAE Systems (UK), Sophos (UK), Xage Security (US), Waterfall Security Solutions (Israel), Nozomi Networks (US), CNL Software (UK), Moxa (Taiwan), GPS Security (Canada), Athos (US), TSN (US), and J&G Security (US). The study includes an in-depth competitive analysis of the key players in the oil and gas security and service market, with their company profiles, recent developments, and key market strategies.

Research coverage

The market study covers the oil and gas security and service market size across segments. It aims at estimating the market size and growth potential of this market across different segments: component, services, security type, operation and region. The study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key benefits of buying the report

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall oil and gas security and service market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

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